

Sectoral Study Series



Preface

In light of Lebanon's evolving export landscape, the CER team at CCIA-BML has undertaken a series of sectoral studies to analyze export patterns and identify growth opportunities. These studies aim to provide Lebanese producers with actionable insights and market analyses to help leverage export trends since 2019 and explore potential markets for their products.

HS 39 Plastics and articles thereof

Executive Summary

This study draws on export data from Lebanese Customs to examine trends in the plastics sector (HS 39). Despite reaching a peak export value of \$384 million in 2022, exports of plastic products declined to \$88.5 million by 2024, with export volumes averaging 46,000 tons annually over the past five years. The data highlights the sector's resilience, supported by a strong domestic base of 319 factories and ongoing demand from regional markets.

Lebanon's primary export destinations for plastic products remain within the Arab region, notably Iraq, Egypt, Qatar, and Saudi Arabia. However, export trends show significant growth toward Iraq, Türkiye, and the United Kingdom between 2019 and 2024 pointing to emerging opportunities beyond traditional markets.

Based on trade data and market access indicators, the study identifies substantial unrealized export potential exceeding \$70 million across several products and countries. High-potential markets include the United States, United Arab Emirates, Italy, Egypt, Nigeria, and Spain. Products with strong prospects include polyethylene terephthalate, tableware, and packaging materials. These findings aim to support Lebanese manufacturers in expanding exports through targeted market entry strategies.

الملخص التنفيذي

تعتمد هذه الدراسة على بيانات التصدير من الجمارك اللبنانية لدراسة اتجاهات قطاع البلاستيك (HS 39) على الرغم من بلوغ قيمة الصادرات ذروتها عند 384 مليون دولار أمريكي في عام 2022، إلا أن صادرات المنتجات البلاستيكية انخفضت إلى 88.5 مليون دولار أمريكي بحلول عام 2024، حيث بلغ متوسط أحجام التصدير 46 ألف طن سنوياً على مدى السنوات الخمس الماضية. تسلط البيانات الضوء على مرونة القطاع، مدعومة بقاعدة محلية قوية تضم 319 مصنعاً والطلب المستمر من الأسواق الإقليمية.

لا تزال وجهات التصدير الرئيسية للبنان من المنتجات البلاستيكية ضمن المنطقة العربية، ولا سيما العراق ومصر وقطر والمملكة العربية السعودية. ومع ذلك، تُظهر اتجاهات التصدير نمواً كبيراً نحو العراق وتركيا والمملكة المتحدة بين عامي 2019 و2024، مما يشير إلى فرص ناشئة تتجاوز الأسواق التقليدية.


استناداً إلى بيانات التجارة ومؤشرات الوصول إلى الأسواق، تحدد الدراسة إمكانات تصدير كبيرة غير محققة تتجاوز 70 مليون دولار أمريكي عبر العديد من المنتجات والبلدان. تشمل الأسواق ذات الإمكانات العالية الولايات المتحدة والإمارات العربية المتحدة وإيطاليا ومصر ونيجيريا وإسبانيا. تشمل المنتجات ذات الآفاق الواعدة البولي إيثيلين تيريفثالات، وأدوات المائدة، ومواد التغليف. تهدف هذه النتائج إلى دعم المصنعين اللبنانيين في توسيع صادراتهم من خلال استراتيجيات دخول أسواق مستهدفة.

HS 39: Plastics

I- General Overview

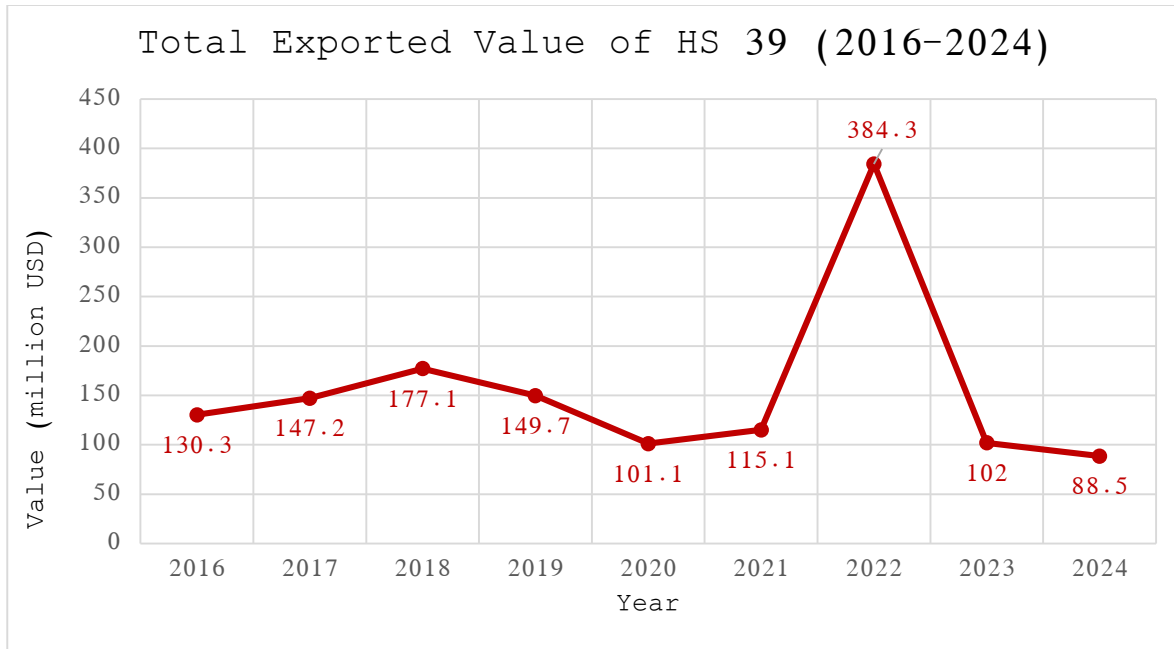
Plastics, classified under HS 39, refer to a diverse group of synthetic and semi-synthetic materials made primarily from petrochemical-based polymers. The plastic industry includes a large number of companies and can be divided into several sectors and products. The global plastic industry is vertically integrated, ranging from raw polymer manufacturing to the transformation of plastic inputs into finished consumer or industrial products.

In 2024, the world's export value of plastics (HS 39) was \$ 729.8 billion. Top exporters were China (\$ 141.2 billion), the United States of America (\$ 80 billion), Germany (\$ 66 billion). Accordingly, top importers were the United States (\$ 78.2 billion), China (\$ 61.1 billion), Germany (\$ 44.5 billion). ([International Trade Center](#)).



In Lebanon, plastic manufacturing is one of the most resilient light industries due to its relatively low capital intensity, wide product variety, and consistent domestic and regional demand, especially for packaging and construction-related items. According to the Industrial Directory published by the Ministry of Industry, 319 factories in the plastics and rubber sector were registered in Lebanon in 2022.

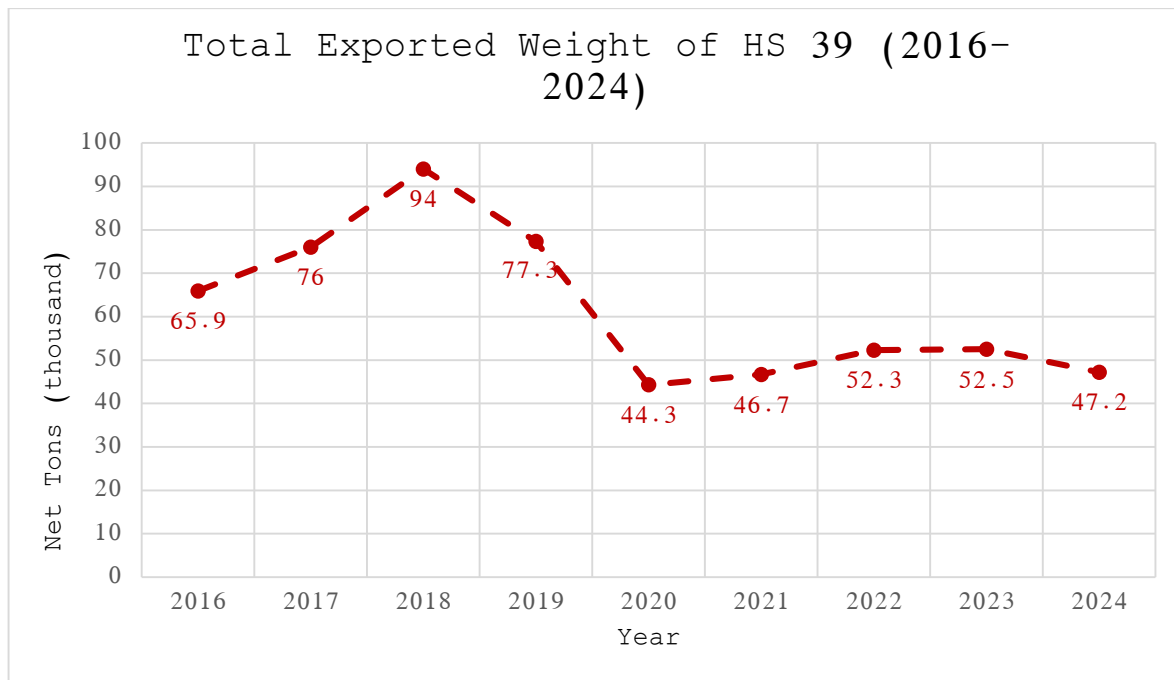
As of 2024, factory data at the HS-8 level show 20 facilities engaged in recycling plastic derivatives (HS 39.01.90), 34 producing PVC, PPR, and PE pipes (HS 39.17.29), 86 manufacturing plastic boxes and crates (HS 39.23.10.10), and 24 specializing in plastic tableware and kitchen utensils (HS 39.24.10.10) (Industrial Directory Company, 2024).



Source: Lebanese Customs

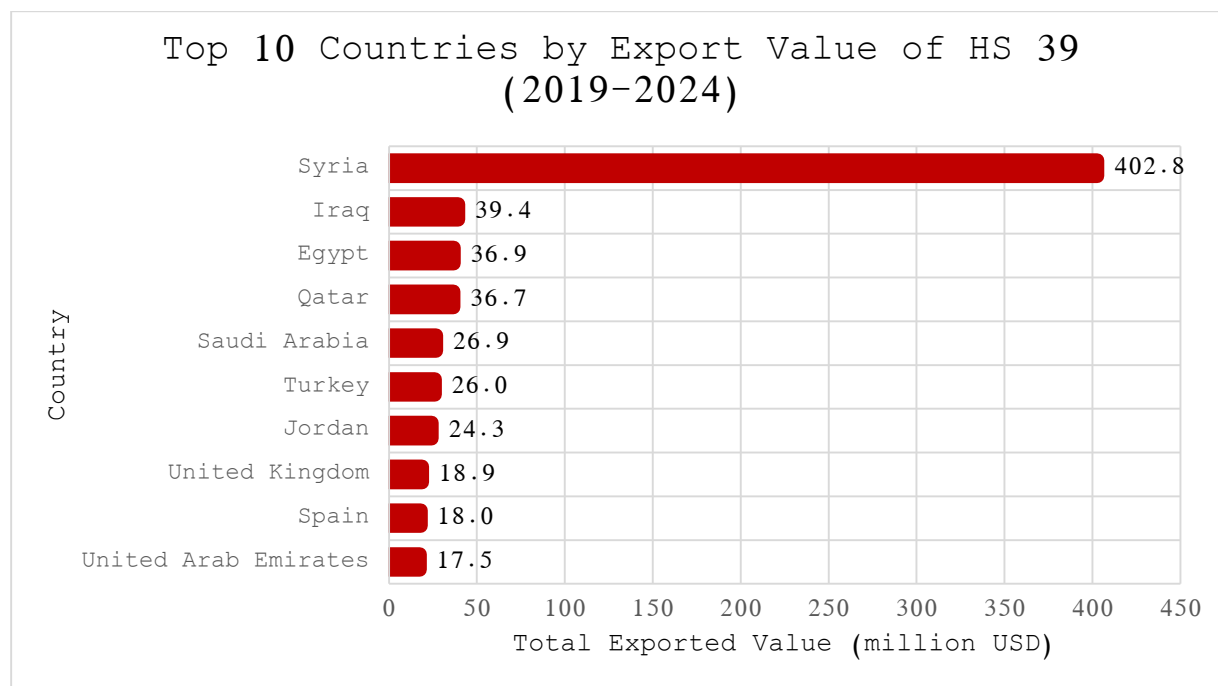
According to the Lebanese Customs, exports of plastics (HS 39) from Lebanon rose from \$130 million in 2016 to a peak of \$384 million in 2022. However, exports declined afterwards to reach \$ 88.5 million in 2024.

In terms of volume, exported plastic products increased from 66,000 tons in 2016 to around 95,000 tons in 2018, before declining to an average of 46,000 tons annually between 2020 and 2024.



Source: Lebanese Customs

The main destination markets for the Lebanese export of plastics (HS 39) are Arab countries. The data reveals that Syria, Iraq, Egypt, Qatar, and Saudi Arabia are among the top markets.

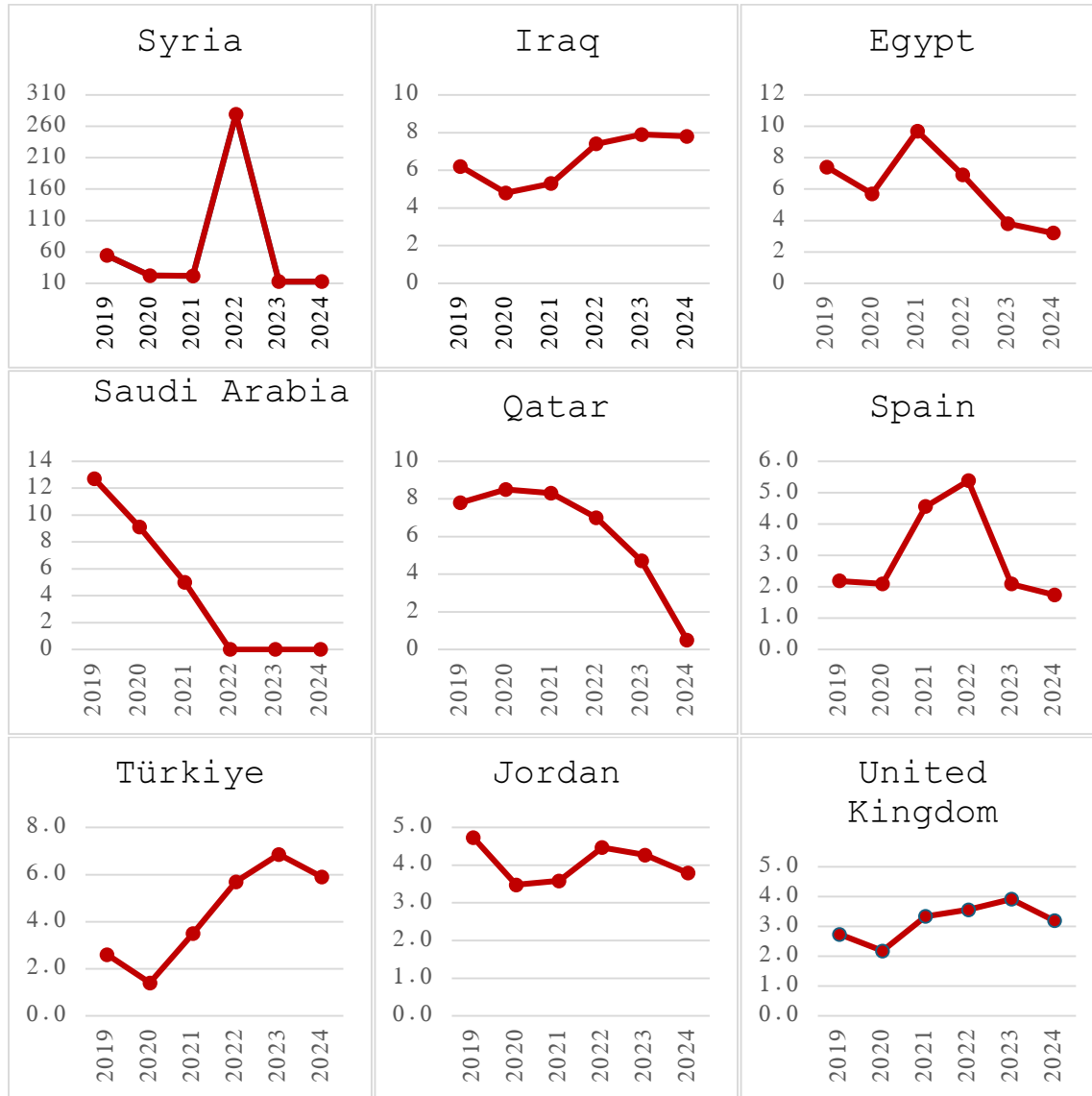


Source: Lebanese Customs

Lebanese exports of plastics have witnessed different trends in the top markets between 2019 and 2024. Exports have been increasing to Iraq, Türkiye, and the United Kingdom. These markets have witnessed an increase in their imports over the covered period by a 5% p.a for Iraq and Türkiye and 2% p.a for the United Kingdom.

In contrast, Lebanese exports declined to Egypt, Qatar, Spain, and the United Arab Emirates. In general, these markets have witnessed an increase in their imports from the world except for Qatar, where imports of plastics decreased by 3% p.a between 2019 and 2024.

Exported value for top countries by year for HS 39



Source: Lebanese Customs

II- Potential Markets

The following tables provide a detailed breakdown of Lebanon's unrealized export potential in the plastics (HS 39) sector. These insights reveal untapped opportunities, at an estimated value of more than **\$70 million** for Lebanese manufacturers to expand their access to different markets.

A- Unrealized Export Potential for Different Goods under Plastics Exports¹

HS Code	Product	Country	Unrealized Potential
39.07.Xb	Polyethylene terephthalate, in primary forms	Algeria	2.4
		Bangladesh	1.5
		Cameroon	3
		Egypt	3.9
		Iraq	2.1
		Italy	5
		Jordan	1.9
		Morocco	1.6
		Nigeria	3.3
		Qatar	2.5
		Saudi Arabia	1.7
		Spain	2.5
		United Arab Emirates	14
		United States	6.1
Approximate Total Unrealized Potential		51,500,000	

HS Code	Product	Country	Unrealized Potential
39.24.10	Table/kitchenware, of plastics	Cameroon	0.211
		Egypt	0.445
		France	0.447
		Germany	0.243
		Kuwait	0.327
		Netherlands	0.436
		Qatar	0.2
		Syrian Arab Republic	0.265
		United Arab Emirates	0.165
		United States	2.4
Approximate Total Unrealized Potential		5,140,000	

¹ Numbers are displayed as millions of \$.

HS Code	Product	Country	Unrealized Potential
39.20.20	Non-cellular propylene polymers, in flat shapes	Egypt	0.394
		Ghana	0.125
		Greece	0.314
		Italy	0.267
		Jordan	0.313
		Nigeria	0.277
		Türkiye	0.22
		United Arab Emirates	0.855
		United States	0.421
Approximate Total Unrealized Potential		3,856,000	

HS Code	Product	Country	Unrealized Potential
39.19.90	Self-adhesive flat shapes, of plastics, not elsewhere specified	Egypt	0.355
		France	0.13
		Germany	0.172
		Greece	0.116
		Morocco	0.1
		Oman	0.14
		Spain	0.186
		Tunisia	0.127
		United Arab Emirates	0.384
		United States	0.3
Approximate Total Unrealized Potential		2,000,000	

HS Code	Product	Country	Unrealized Potential
39.20.10	Non-cellular ethylene polymers, in flat shapes	France	0.215
		Greece	0.151
		Jordan	0.328
		Kuwait	0.142
		Liberia	0.133
		United Arab Emirates	0.5
		United States	0.419
Approximate Total Unrealized Potential		1,888,000	

HS Code	Product	Country	Unrealized Potential
39.01.10	Polyethylene, specific gravity <0,94, in primary forms	Côte d'Ivoire	0.258
		Egypt	0.259
		Greece	0.215
		Italy	0.204
		Morocco	0.185
		Spain	0.209
		Türkiye	0.236
		United Arab Emirates	0.15
Approximate Total Unrealized Potential		1,716,000	

HS Code	Product	Country	Unrealized Potential
39.23.10	Boxes & similar, for conveyance/packaging of goods, of plastics	Cameroon	0.304
		France	0.152
		Greece	0.21
		Kuwait	0.118
		Oman	0.1
		Spain	0.213
		Türkiye	0.138
		United States	0.402
Approximate Total Unrealized Potential		1,637,000	

HS Code	Product	Country	Unrealized Potential
39.23.29	Sacks & bags, of plastics, not elsewhere specified	Iraq	0.124
		Kuwait	0.21
		Netherlands	0.2
		Saudi Arabia	0.1
		Togo	0.3
		United Arab Emirates	0.2
		United States	0.384
Approximate Total Unrealized Potential		1,520,000	

HS Code	Product	Country	Unrealized Potential
39.23.21	Sacks & bags, of ethylene polymers	France	0.152
		Germany	0.11
		Netherlands	0.148
		Saudi Arabia	0.1
		United Kingdom	0.1
		United States	0.413
Approximate Total Unrealized Potential		1,023,000	

Source: [ITC Market Access Map](#)

B- Requirements and Tariff Imposed by Potential Markets

The tables below outline the regulatory requirements and tariff structures imposed by key destination markets for the products highlighted in the above tables².

HS Code	Product	Country	Number of Requirements	Tariff Imposed
39.07.Xb	Polyethylene terephthalate, in primary forms	Algeria	19	0% (league of Arab States)
		Cameroon	19	10%
		Egypt	35	0%
		Italy	13	0% (FTA- EU)
		Morocco	1	0% (league of Arab States)
		Nigeria	1	5%
		Spain	13	0% (FTA- EU)
		United Arab Emirates	22	0% (league of Arab States)
		United States	31	6.5% (GSP countries may benefit from preferential treatment)

HS Code	Product	Country	Number of Requirements	Tariff Imposed
39.24.10	Table/kitchenware, of plastics	United States	9	3.4% to 6.5% + 10% ad valorem
		Kuwait	11	0% (league of Arab States)
		France	5	0% (FTA- EU)
		Egypt	38	0% (league of Arab States)
		Netherlands	5	0% (FTA- EU)

² Importers of the highlighted products in the destination markets can be available on the ITC Trade Map website.
For more information: research-dep@ccib.org.lb

HS Code	Product	Country	Number of Requirements	Tariff Imposed
39.20.20	Non-cellular propylene polymers, in flat shapes	Egypt	37	0% (league of Arab States)
		Ghana	N/A	10%
		Greece	11	0% (FTA- EU)
		Jordan	2	0% (league of Arab States)
		Nigeria	1	10% to 20% (NTL)
		United Arab Emirates	19	0% (league of Arab States)

HS Code	Product	Country	Number of Requirements	Tariff Imposed
39.19.90	Self-adhesive flat shapes, of plastics, not elsewhere specified	Egypt	34	0% to 20% (0% for the league of Arab States)
		Germany	11	0% (FTA- EU)
		United Arab Emirates	19	0% (league of Arab States)

HS Code	Product	Country	Number of Requirements	Tariff Imposed
39.20.10	Non-cellular ethylene polymers, in flat shapes	France	11	0% (FTA- EU)
		Jordan	2	0% (league of Arab States)
		Kuwait	22	0% (league of Arab States)
		United Arab Emirates	20	0% (MFN)
		United States	30	0% GSP + 10% ad-valorem

HS Code	Product	Country	Number of Requirements	Tariff Imposed
39.01.10	Polyethylene, specific gravity <0,94, in primary forms	Côte d'Ivoire	N/A	5%
		Egypt	34	0%
		Greece	11	0% (FTA- EU)
		Morocco	1	0% to 17% (0% for league of Arab states)
		Türkiye	10	6.50%

HS Code	Product	Country	Number of Requirements	Tariff Imposed
39.23.10	Boxes & similar, for conveyance/packaging of goods, of plastics	Cameroon	19	10%
		France	5	0% to 5% (0% FTA-EU)
		Kuwait	11	0% (league of Arab States)
		Türkiye	4	6.50%
		United States	19	0% GSP + 10% ad-valorem

HS Code	Product	Country	Number of Requirements	Tariff Imposed
39.23.21	Sacks & bags, of ethylene polymers	France	5	0% (FTA- EU)
		Netherlands	5	0% (FTA- EU)
		United States	N/A	0% for GSP, 10% ad valorem

Source: [ITC Market Access Map](#)

C- Potential Importers in Target Markets³

Company Name	Country	City	Website
Techno Stationery	Algeria	Mohammadia	https://zeeetrading.com/
ACE Group	Egypt	Cairo	https://www.aceindustry.net/#17
Cossa Polimeri s.r.l.	Italy	Gorla Maggiore	cossapolimeri
Lati Industria Termoplastici S.P.A.	Italy		https://www.lati.com/en/contacts/
Emirates Grain Products Company Llc	United Arab Emirates	Sharjah	https://iffco.com/
Acme Plastics Inc	United States of America	Miami	https://www.acmeplastics.com/

Source: ITC Trade Map

³ More can be found for specific products throughout ITC Trade Map.

D- Partners in Lebanon that can Provide Support:

Chamber of Commerce, Industry and Agriculture of Beirut and Mount-Lebanon

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Beirut, Lebanon

Phone: +961 1 353190

Email:dg-office@ccib.org.lb

Trade Point Beirut - Ministry of Economy and Trade

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